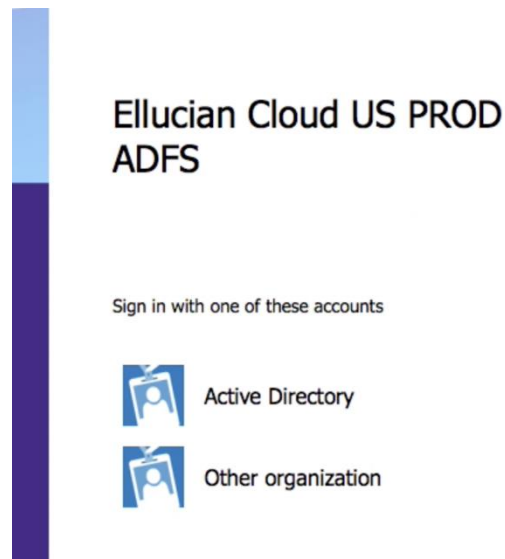


ELLUCIAN CRM ADVISE

Ellucian CRM Advise for Faculty Advisors: this should be the main tool to identify student holds, review automated or faculty-raised alerts, see members of student success team, see completed courses and grades, see current grades for any students whose faculty use blackboard grading, post office hours to allow students to make online advisement appointments, send emails to one or all of their advisees, and document their advisement sessions.

For assistance on using Advise, access the Advise faculty user support [site](#) (you must be logged into your Kean email to access this site). You will also find information there with step-by-step instructions on sending both individual as well as mass emails to your advisees.

Once you initially enter the above [Kean Advisor Experience](#) identified above you will see the following:



Click on the Other Organization link. You will then see:

Ellucian Cloud US PROD ADFS


← Other organizational account

If your organization has established a trust relationship with Ellucian Cloud US PROD ADFS, enter your organizational account below.

someone@example.com 

Next

Enter your username@kean.edu then click next, then you should see:



Sign in to your account

KeanGoogle User Name Password Sign In

Enter your Kean email username (without the @kean.edu) and your email password. This will get you to the main dashboard for advising.

HOW WE RECOMMEND USING CRM ADVISE:

1. Establish some advisement office hours (we recommend starting with 6 per week) in Advise so that your advisees can make appointments with you (see the above Google site for the tutorial on how to do this). Leave 10 minutes between appointments, so you can document your previous session and prepare for your next session.
2. Send an email through Advise to all of your advisees with instructions on how to contact you for advisement (we recommend inserting the link for the [Student Experience for Advise](#) and tell them to make a virtual appointment for advisement.
3. Once they make an appointment, send them a Google Hangouts Meet link through your Google Calendar account. This will allow you to have a voice or video chat with your student without disclosing your phone number. For information on how to do this click [here](#). You can do advisement via email, but this involves a great deal of back and forth, and sometimes crossing messages, so voice or video is the most efficient.

IN PREPARATION FOR THE VIRTUAL ADVISEMENT SESSION:

4. Enter your Advisee's ID number in the search field and review their student dashboard to see holds, raised alerts, current success team members, major, GPA, in-progress and completed courses and other demographic information (see the [Advise User Support site](#) for the tutorial on how to explore the dashboard, you must be logged into your Kean email to access this site).
5. Review the advisee's program evaluation through [KeanWISE](#) to prepare to discuss potential future classes. **Note: you cannot view the Program Evaluation through Advise. It must be viewed through KeanWISE (or Colleague for those who use that).** Also review their current schedule to discuss how they are doing in their current classes, and see if they need referrals for academic support, or if they need to drop their classes.

DURING THE VIRTUAL ADVISEMENT SESSION:

6. Please make sure to ask how students are doing in the online classes and how they are doing otherwise.
7. Many students may be struggling with the move to online instruction, or struggling with feeling overwhelmed and isolated. It is important to make note of that in Advise and raise the relevant alerts through Advise as well as through [KUBIT](#) if appropriate, so that the Counseling Center and other appropriate offices are made aware.

AFTER COMPLETING THE VIRTUAL ADVISEMENT SESSION:

8. Send a confirmation email through Advise confirming the classes you recommended for the student.
9. Document, document, document! Use the Notes function in Advise to document the session and what you advised the student to do. Upload any emails that you sent to the student outside of Advise, or any other information that will be useful for future advisement sessions. For a tutorial on how to do this, please see the above Advise User Support site.
10. Send any appropriate referrals to other members of the success team as appropriate.